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ABSTRACT

This report presented forms and guidelines for evaluating a superintendent of schools. Forms were contributed by Fort Worth, Texas; California School Boards Association and Association of California School Administrators; Tulsa, Oklahoma; Texas Association of School Boards; Madison, Wisconsin; Pomona Unified School District; Roseville, Michigan; Lansing, Michigan; and Wayne-Westland Community Schools, Michigan. The emphasis of the forms differed; evaluation was based on job description and performance objectives. Guidelines for evaluation were described in the report. Stress was placed on criteria to be evaluated; schedule for time, place and frequency of evaluation; discussion of strengths and weaknesses; objective evidence and rationale for basis of judgement. A five item bibliography was included. (BRB)

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ERS

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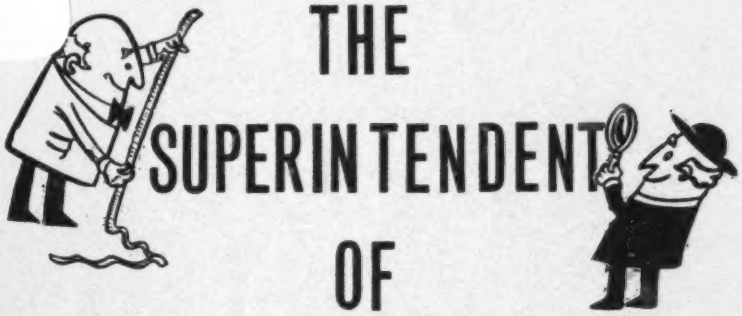
EVALUATING THE SUPERINTENDENT OF SCHOOLS



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EVALUATING THE SUPERINTENDENT OF SCHOOLS

Loyd L. Turner, of the Fort Worth, Texas board of education, observed in an article in the July 1971 issue of the American School Board Journal (5)[1/] that the evaluation of the superintendent of schools is an important responsibility which many boards handle "poorly, infrequently, or not at all." With the increasing emphasis on accountability, however, it is inevitable that boards will no longer be able to escape the responsibility of seriously and competently evaluating the performance of the highest paid school employee. This fact is evident from the number of requests in the past year to AASA's Educational Research Service for sample procedures and forms for evaluating the superintendent of schools.

There is really nothing new about a board of education evaluating its superintendent. Evaluation is implicit whenever a board makes a decision to extend the superintendent's contract, increase his salary, or discharge him. What *is* new is the increasing interest in setting up formal procedures for the evaluation of the superintendent as a regular and scheduled board action and against performance standards agreed to by the board and superintendent well in advance of contract renewal time.

To date, ERS has not had much success in its attempts to assist those requesting help in the area of superintendent evaluation. A thorough search of educational literature reveals only three articles on evaluating the superintendent published prior to Mr. Turner's article (1, 3, and 4). Even as of this writing, only one other article has appeared on the subject (2).

In order to more adequately meet the needs of inquirers, the Educational Research Service in September 1972 sent requests to the 581 school systems enrolling 12,000 or more pupils for copies of forms or descriptions of procedures used in evaluating their superintendents. Although 185 systems replied that evaluation of the superintendent is conducted on a regular basis, the majority described it as a formal or informal face-to-face discussion between the superintendent and board, usually once a year, with no forms or written guidelines involved.

Forms and guidelines for evaluating the superintendent were contributed by 48 school systems. A number of these were based on forms developed by an organization or school system and adopted, with or without modification, by other systems. The remainder were locally-developed instruments.

Fort Worth form. The procedure and form developed by Loyd L. Turner and his fellow board members in Fort Worth, Texas, is reproduced on pages 5 and 6 and is discussed by Mr. Turner in bibliography reference 5. The superintendent's contract specifies an annual review of performance. The 21 items on the evaluation form were drawn up by board members originally as a guide to qualifications to be sought when they were in quest of a new superintendent several years ago.

The new Fort Worth superintendent was given a three-year contract. Once each year since then, the board has met in executive session for the purpose of evaluating the superintendent. Each member rates him on each of the 21 points, anonymously, and the results are plotted on a graph (see profile on page 6). The overall grade on this composite "board's-eye" view determines the board's action. The board may give the superintendent a salary increase and/or extend his contract (putting him under a three-year contract as before), or it may decline to

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[1/] Numbers in parentheses refer to references in the bibliography on page 4.

do either and put him on notice that improvement is needed. After the board has made its decision, the superintendent is called in and given a copy of the performance graph; a frank give-and-take discussion follows.

It is of interest to note that similar contracts and procedures govern the employment of all top administrators in the Fort Worth school system.

Association of California School Administrators form. This form is the earliest example in this Circular of an evaluation instrument for a superintendent. It is described in the August 1965 article in *School Management* (4) as being used by some California school districts. (A variation of the form is under consideration for adoption by the Washington Association of School Administrators.) The form used by responding school systems is reproduced on pages 7-9. As originally published by ACSA, however, the form included another section to be used by the board and the superintendent in evaluating their working relationships.

Tulsa form. Also reproduced with Mr. Turner's article (5) is the form used by the Tulsa, Oklahoma, board of education (and other responding systems) to annually evaluate the superintendent. Page 10 of this Circular duplicates the form.

Texas Association of School Boards form. The form reproduced on page 11 has been adopted by some school systems from the Texas handbook for school board members, prepared in 1968 by the Texas Association of School Boards in cooperation with the Texas Education Agency.

Evaluation based on the superintendent's job description. If the board feels the superintendent's job description is an adequate one and if the board does not limit its evaluation to the items in the description, the job description may provide a good basis for the superintendent's evaluation. An example of a job description converted to an evaluation form is reproduced on pages 12-14. Other systems reported that the job description is used as the basis for the discussion.

Performance objectives as a basis for evaluation. The setting of performance goals against which employees will be evaluated is becoming increasingly popular as a means of personnel evaluation. This procedure may involve tying the results to salary decisions in a merit system, as it does in Madison, Wisconsin; the 1972-73 management contract for the Madison superintendent is reproduced on pages 15-19. When the system includes setting of objectives for all administrative personnel, it is referred to as management by objectives. The procedure involves setting goals for the superintendent by the superintendent and board, and periodic check-ups on goal achievement before the final evaluation is conducted. For a description of how the system works, see bibliography reference 2.

Evaluation on form used for all administrative employees. Less satisfactory than other procedures for evaluating the superintendent is the use of a general checklist of characteristics and performance factors which are common to all administrators. No example of this type of evaluation form has been included herein. Readers interested in utilizing this type of form are referred to ERS Circular No. 6, 1971, *Evaluating Administrative/Supervisory Performance* (60 p., $3).

Locally-developed forms. In lieu of any satisfactory forms from other sources, some superintendents and boards have invented their own forms. Forms developed in this way have the advantage of being tailored to a particular school system. Five examples of such forms are reproduced on pages 20-35.

Board members and superintendents who are looking for a procedure to use in their systems are cautioned that the examples contained herein are offered so that they may be ADAPTED to your school system--not ADOPTED by your system. It is also recommended that the board accomplish this modification and personalization in conjunction with the superintendent.

GUIDEPOSTS

Each of the procedures described in this Circular has points to recommend it, and pitfalls as well. For instance, evaluation according to performance objectives provides direction for the superintendent and at the same time measurable evidence as to how well the school system is doing in certain areas, but it is very time-consuming to administer.

Whatever procedure is used--whether one of those described herein or a locally-developed method--the available literature, as well as the thinking of the individuals who use the various procedures, suggest a number of essentials in the process of evaluating a superintendent, as follows:

1. The superintendent should know the standards against which he will be evaluated. Better yet, he should be involved in the development of those standards.

2. Evaluation should be at a scheduled time and place, with no other items on the agenda, at an executive session with all board members present.

3. The evaluation, if written, should be a composite of the individual board members' opinions, but the board as a whole should meet with the superintendent to discuss it with him.

4. The evaluation should include a discussion of strengths as well as weaknesses.

5. The evaluation should be fairly frequent--at least once a year, but more often for contracts which run only a year or two. Thus, in case the decision is reached not to renew a superintendent's contract, the board can point to previous "warnings" of deficiencies.

6. Both sides should prepare for the evaluation--the superintendent by conducting a rigorous self-evaluation, the board by examining various sources of information relating to the superintendent's performance. Areas reviewed by the board might include the superintendent's job description; district goals, plans, and projects; situational factors which may influence the superintendent's performance; previous performance evaluations; and instances of outstandingly excellent or deficient performance.

7. The board should not limit itself to those items which appear on the evaluation form or in the list of performance objectives. It would be difficult to develop a form or set of guidelines which will guarantee that every area is covered.

8. Each judgment should be supported by as much rationale and objective evidence as possible. One board member's opinion should not be the sole basis for judgment on an appraisal item.

9. The superintendent should have the opportunity to evaluate the board, individually as well as collectively. Ideally the evaluation includes an examination of the working relationships between the board and superintendent.

A CASE AGAINST FORMAL EVALUATION

One superintendent who reported that his board does not conduct a formal evaluation of his performance on a scheduled basis prefers it that way. His opinion merits consideration:

"My board has used an open-door policy for evaluating their superintendent. Under this policy each board member meets with the superintendent to discuss matters of concern to him personally, or calls for a joint meeting to discuss a matter that pertains to the conducting of the school system.

"The superintendent does not go home on board nights but rather remains free to meet with the board. We have had many meetings where concerns were discussed openly and where the superintendent was challenged on decisions he had recently made.

"This free type of evaluation has meant a great deal more to me than would a formal evaluation. A superintendent has to work closely with his board in order to succeed. Our open-door policy gives all parties an opportunity to clear the air quickly and efficiently. I know where I stand from day to day; I don't have to wait to the end of the year to find out where I stand with the board."

This ongoing evaluation "procedure" is probably typical in many school systems, even those which evaluate superintendents formally.

BIBLIOGRAPHY

1. Boyd, James B. "How to Appraise School Superintendents." Nation's Schools 78: 34-38; July 1966.

Reproduces an 111-item evaluation form requiring a "Yes" or "No" answer to each item, to be used by board members to evaluate superintendents.

2. McCarty, Donald J. "Evaluating Your Superintendent." School Management 15: 38-39; July 1971.

Discusses difficulties of evaluating a superintendent and reasons for not doing it, and suggests a plan for evaluating a superintendent, based on mutually established goals for the coming year.

3. Moffitt, Frederick J. "Moffitt Offers Sure-Fire Test for Superintendents." Nation's Schools 79: 8; June 1967.

A tongue-in-cheek comment on Boyd's evaluation form (see item No. 1 above); offers a humorous seven-point test for prospective superintendents.

4. School Management. "How to Evaluate Your Superintendent." School Management 9: 42-45; August 1965.

Reproduces evaluation forms used in some California school districts to evaluate their superintendents.

5. Turner, Loyd L. "Your Superintendent: When to Recharge Him--or Discharge Him." American School Board Journal 159: 16-19; July 1971.

Describes the method used by the Fort Worth, Texas, board of education to evaluate the superintendent each year and decide whether to offer him a salary increase and/or extend his contract, or decline to extend his contract until improvement is shown. Reproduces evaluation forms used in Fort Worth and in Tulsa, Oklahoma.

ALSO ON PERSONNEL EVALUATION

Three additional ERS Circulars

Evaluating Administrative/Supervisory Performance. ERS Circular No. 6, 1971. 60 p. $3.

Evaluating Teaching Performance. ERS Circular No. 2, 1972. 60 p. $3.

The Evaluation of Noncertificated Personnel. ERS Circular No. 4, 1969. 48 p. $1.50.

The above Circulars may be ordered directly from the Educational Research Service at the prices indicated. For quantity discounts, see back cover of this Circular. Payment or purchase order should accompany an order.

BOARD'S EVALUATION OF SUPERINTENDENT
Fort Worth, Texas

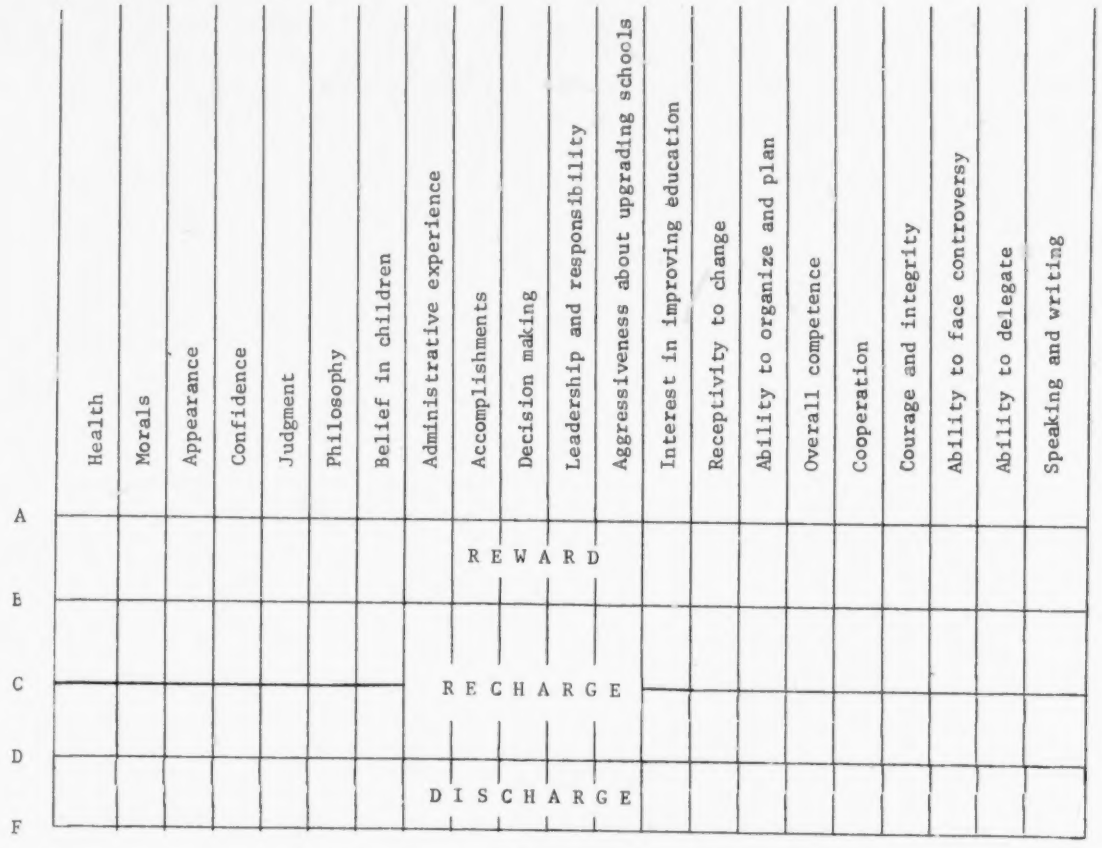
Please circle one letter after each qualification.

1. Excellent health. A B C D F
2. High moral character. A B C D F
3. Pleasing personal appearance. A B C D F
4. Proper degree of confidence and idealism. A B C D F
5. Good judgment, common sense, and perception. A B C D F
6. Sound philosophy of education and its role in life. A B C D F
7. Deep-seated belief that the public schools are operated for the benefit of the children and the adults enrolled in them--not for boards, administrators, teachers, or parents. A B C D F
8. Broad administrative experience, preferably in medium- or large-size school system(s). A B C D F
9. Varied accomplishments. A B C D F
10. Demonstrated ability to make decisions promptly and correctly. A B C D F
11. Proven ability to lead and to shoulder responsibility. A B C D F
12. Aggressiveness about upgrading the public school system. A B C D F
13. A pronounced interest in improving the instructional program. A B C D F
14. An open mind about the status quo and the many changes facing public education. A B C D F
15. Ability to organize effectively and to plan ahead to meet the school system's problems. A B C D F
16. Competence in business management; personnel administration; plant operation and maintenance; and personal, community, and press relations. A B C D F
17. An appreciation of the need for close working relationships with teachers and board members and the general public and agencies in a position to improve public education. A B C D F
18. Unquestioned courage, integrity, and honesty. A B C D F
19. Ability to face controversy, to remain true to convictions, and to live with a high-pressure job. A B C D F
20. Ability to delegate authority and to expedite. A B C D F
21. Ability to speak and write acceptably. A B C D F

(Each board member gives the superintendent a grade of A, B, C, D, or F in these qualifications. These grades are then plotted on a graph similar to the one on the next page. Result is a composite board's-eye view of the superintendent's performance, indicating whether he should be rewarded, recharged, or discharged.)

(Continued)

Fort Worth form (Continued)



GUIDELINE FOR PERSONAL EVALUATION OF THE SUPERINTENDENT
California School Boards Association and
Association of California School Administrators

NOTE: The evaluation instrument reproduced here is suggested for use in a "personal" evaluation of the Superintendent. CSBA and ACSA recommend a three phase evaluation, as follows:

A. An appraisal of the main areas in which the superintendent functions, such as administration and organization, curricula and instructional methods, employee and pupil personnel services, personnel recruiting and inservice training, business and financial management, school plant management and planning, and community relations.

B. A personal evaluation of the superintendent, such as his relationship with the board, community relationships, staff and personnel relationships, educational leadership, and relevant qualities of character and personality.

C. A self-appraisal of the board (which may also call for a reaction from the superintendent) with special attention to the following areas: relationship with superintendent; community relationships; board meetings; staff and personnel relationships; relationship to the instructional program; and relationship to the financial management of the schools.

The rationale for the three-phased evaluation is as follows:

It should be remembered that much of the work of the superintendent is circumscribed by the policies of the board, the manner in which the board works, and the resources available to the district. Conversely, the effectiveness of the board is greatly affected by the quality of the work of the superintendent. Therefore, it might well be emphasized that the evaluation of the superintendent should be based on an evaluation of the joint responsibilities of the board and the superintendent. Such a process of evaluation will usually indicate certain weaknesses and strengths of both board and superintendent performance. This should then result in a higher degree of objectivity and an increase in the effectiveness of the performance record of both board and superintendent.

A. Relationship with the Board. The superintendent:

1. Keeps the board informed on issues, needs, and operation of the school system.
2. Offers professional advice to the board on items requiring board action, with appropriate recommendations based on thorough study and analysis.
3. Interprets and executes the intent of board policy.
4. Seeks and accepts constructive criticism of his work.
5. Supports board policy and actions to the public and staff.
6. Has a harmonious working relationship with the board.
7. Understands his role in administration of board policy, makes recommendations for employment or promotion of personnel in writing and with supporting data, and accepts responsibility for his recommendations. If the recommendation is questioned by the board, he finds another person to recommend.
8. Receives recommendations for personnel from board members with an open mind but applies the same criteria for his selection for recommendation as he applies to applications from other sources.

(Continued)

ASCA form (Continued)

9. Accepts his responsibility for maintaining liaison between the board and personnel, working toward a high degree of understanding and respect between the staff and the board and the board and the staff.
10. Remains impartial toward the board, treating all board members alike.
11. Refrains from criticism of individual or group members of the board.
12. Goes immediately and directly to the board when he feels an honest, objective difference of opinion exists between him and any or all members of the board, in an earnest effort to resolve such difference immediately.
13. Feels free to maintain his opposition to matters under discussion by the board until an official decision has been reached, after which time he subordinates his own views to those of the board as long as he remains in its employ.

B. Community Relationships. The superintendent:

1. Gains respect and support of the community on the conduct of the school operation.
2. Solicits and gives attention to problems and opinions of all groups and individuals.
3. Develops friendly and cooperative relationships with news media.
4. Participates actively in community life and affairs.
5. Achieves status as a community leader in public education.
6. Works effectively with public and private agencies.

C. Staff and Personnel Relationships. The superintendent:

1. Develops and executes sound personnel procedures and practices.
2. Develops good staff morale and loyalty to the organization.
3. Treats all personnel fairly, without favoritism or discrimination, while insisting on performance of duties.
4. Delegates authority to staff members appropriate to the position each holds.
5. Recruits and assigns the best available personnel in terms of their competencies.
6. Encourages participation of appropriate staff members and groups in planning, procedures, and policy interpretation.
7. Evaluates performance of staff members, giving commendation for good work as well as constructive suggestions for improvement.
8. Takes an active role in development of salary schedules for all personnel, and recommends to the board the levels which, within budgetary limitations, will best serve the interests of the district.
9. At the direction of the board, meets and confers with the negotiating council, representing to the best of his ability and understanding the interest and will of the board.

D. Educational Leadership. The superintendent:

1. Understands and keeps informed regarding all aspects of the instructional program.
2. Implements the district's philosophy of education.
3. Participates with staff, board, and community in studying and developing curriculum improvement.
4. Organizes a planned program of curriculum evaluation and improvement.

(Continued)

ASCA form (Continued)

5. Provides democratic procedures in curriculum work, utilizing the abilities and talents of the entire professional staff and lay people of the community.
6. Exemplifies the skills and attitudes of a master teacher and inspires others to highest professional standards.

E. Business and Finance. The superintendent:

1. Keeps informed on needs of the school program--plant, facilities, equipment, and supplies.
2. Supervises operations, insisting on competent and efficient performance.
3. Determines that funds are spent wisely, and adequate control and accounting are maintained.
4. Evaluates financial needs and makes recommendations for adequate financing.

F. Personal Qualities. The superintendent:

1. Defends principle and conviction in the face of pressure and partisan influence.
2. Maintains high standards of ethics, honesty, and integrity in all personal and professional matters.
3. Earns respect and standing among his professional colleagues.
4. Devotes his time and energy effectively to his job.
5. Demonstrates his ability to work well with individuals and groups.
6. Exercises good judgment and the democratic processes in arriving at decisions.
7. Possesses and maintains the health and energy necessary to meet the responsibilities of his position.
8. Maintains poise and emotional stability in the full range of his professional activities.
9. Is customarily suitably attired and well groomed.
10. Uses English effectively in dealing with staff members, the board, and the public.
11. Writes clearly and concisely.
12. Speaks well in front of large and small groups, expressing his ideas in a logical and forthright manner.
13. Thinks well on his feet when faced with an unexpected or disturbing turn of events in a large group meeting.
14. Maintains his professional development by reading, course work, conference attendance, work on professional committees, visiting other districts, and meeting with other superintendents.

COMMENTS:

SUBJECT OF EVALUATION _____

DATE _____

RATING THE SUPERINTENDENT
Tulsa, Oklahoma

Rating instruction. Rate the superintendent on each of the items listed below, using a 1 to 5 scale (1 is excellent; 3 is average; 5 is poor).

_____ 1. Public relations - availability to the press, PTA, and various community groups with special or general interests in education, to interpret school programs and personal needs.

_____ 2. Legislative role - maintains liaison with state and federal legislators in effort to accomplish legislation needed for school improvement.

_____ 3. Employee morale - seeks to foster high morale and cohesiveness among such employee groups as supervisors, teachers, principals, superintendent's staff.

_____ 4. Board relationship - keeps Board adequately informed of developments and administrative actions; helps achieve unity among diverse viewpoints and yet remains responsive to particular interests of individual Board members.

_____ 5. Exemplifies district philosophy - seeks to achieve community understanding of educational goals for the district; attempts to obtain support among the groups for progress in developing a system sensitive to change as student needs and societal conditions would indicate.

_____ 6. Management techniques -

_____ Adheres to policies of the Board of Education

_____ Establishes lines of reponsibility clearly among staff

_____ Budget preparation and executive process

_____ Job description - performance appraisal of employees

_____ Eliciting staff leadership capabilities

_____ Effective planning skills

_____ Organization responsive to school problems

_____ General decision making process

_____ Appropriate personnel assignments

_____ Curriculum and program planning

_____ 7. Professional growth - participates personally in professional activities and encourages employees to engage in self-improvement programs that expose them to new developments in their fields.

STANDARDS FOR BOARDS TO JUDGE FITNESS OF SUPERINTENDENT
Texas Association of School Boards

1. Reputation as a man and as a public worker among the leaders of the community.

1 2 3 4 5 6 7 8 9 10
unsatisfactory average superior

NOTE: Each of the following statements is followed by a scale.

2. Aggressiveness and skill in promoting a workable program for the welfare and continuous improvement of the community.

3. Personal courage, exercised with appropriate tact, in facing opposition to the schools or the schools' program of progress.

4. Avoidance of fanfare and self-publicity in public relations.

5. Knowledge and appreciation of the value of a public dollar and ability to propose school budgets accordingly.

6. Knowledge of the instructional program.

7. Skill and application in searching for and obtaining high-grade teachers, supervisors and staff members as needed, and in assigning them to tasks well adapted to their special abilities.

8. Ability to deal democratically and effectively with both certificated and noncertificated personnel; that is, in such a way as to maintain the respect of teachers and other personnel and at the same time to stimulate them to whole-hearted effort.

9. Genuine interest in, and understanding and appreciation of, children and youth and their problems of "growing up."

10. Promptness and skill in keeping the board of education and the public well informed about what is going on in the schools through adequate oral and written reports to the board and to the people, effective relations with the press, and well-planned and well-managed school activity demonstrations and exhibits.

11. Tendency to "keep his feet on the ground" by having due respect for procedures that are traditional, yet adopting new and better methods when advisable.

12. Success, together with his wife and family, in fitting into the social, civic, and religious life of the community.

13. Capacity for maintaining the respect of educational leaders in neighboring communities, and with the leaders in the schools of similar size and prominence throughout the region, state, or nation.

GREATEST ASSETS

1.

2.

3.

AREAS OF NEEDED IMPROVEMENT

1.

2.

EVALUATION OF THE GENERAL SUPERINTENDENT
Houston, Texas

The General Superintendent shall:	Superior	Above average	Average	Unacceptable	Remarks
a. Direct the management of the district within the framework of all board policies.					
b. Enforce all applicable provisions of laws and regulations					
c. Provide professional counsel to the board in its deliberations					
d. Devote his full time and energy to the performance of his duties in a faithful, diligent, and efficient manner.					
e. Provide for the development and implementation of long- and short-range plans for achieving district goals and objectives, and recommend such plans to the board.					
f. Recommend specific policies, procedures, plans, and programs for attaining current operative objectives, and provide leadership in solving major problems and in providing orderly management and maximum utilization of resources.					
g. Establish and maintain a sound plan of organization and assignment of line and staff personnel which will provide the proper framework for accomplishing the district's objectives.					
h. Provide for the proper delegation of authority and responsibility throughout the organization.					
i. Provide for thorough and complete dissemination, interpretation and administration of all district policies in order to establish a framework within which key subordinates can discharge their responsibilities effectively.					
j. Recommend and/or approve the selection, appointment, and assignment of responsibility of key district personnel, as authorized by the board of education.					
k. Establish effective controls for measuring the performance of key administrators against established objectives.					

The General Superintendent shall:	Superior	Above average	Average	Unacceptable	Remarks
l. Provide for the development of executive and administrative talent to meet present and future organizational needs.					
m. Appraise the performance and progress of the district through effective controls and reports of district activities and through contacts and conferences with key subordinates. Initiate corrective action where required.					
n. Provide the board of education with reports and information which will enable it critically to review operation of the district and to give constructive advice and guidance as to possibilities for improvement.					
o. Direct the preparation of and recommend to the board of education for approval, the annual district budget and administer the school system within approved budget limits.					
p. Provide for the establishment of school attendance boundaries within the district and recommend to the board of education for approval.					
q. Provide for the selection of sites for locating future school facilities and recommend to the board of education for approval.					
r. Develop, recommend and carry out, in coordination with members of the board, a planned program for effective communication between the schools and the general public and for maintaining favorable external relations with other state, regional, and local governments and/or agencies, businesses, industry, and professional groups.					
s. Stay abreast of trends and developments in the field of elementary and secondary education that may affect the well being and future of the district and apply the best new techniques and knowledge to district operations. Make every effort to make the Houston Independent School District the strongest and most outstanding school system in America.					

(Continued)

Houston form (Continued)

The General Superintendent shall:	Superior	Above average	Average	Unacceptable	Remarks
t. Manage district affairs aggressively and imaginatively with emphasis on systematically maintaining and improving the quality of the Houston public schools, coordinating administrative and academic affairs consistent with board policies.					
u. Be responsible for the preparation and distribution of the agenda for all board meetings and for follow-up on action taken.					
v. Prepare, maintain and regularly update a book of administrative policies, maintaining a copy of these policies in the principal's office of each school, the board office, and the offices of such administrative personnel as deemed necessary.					
w. Perform such other duties as may be designated by the board of education.					

MANAGEMENT CONTRACT WITH DOUGLAS S. RITCHIE
Madison, Wisconsin

I. District Goals: Year of Assessment

A. Because of the many programs and procedures that have been both implemented and maintained by the Madison Public Schools over the past several years, it seems advisable to spend a "Year of Assessment" in "taking stock" in order to regroup existing and potential resources with future objectives. To facilitate this, the Superintendent:

1. Will develop a plan to include a series of studies concerning citizen perceptions of school programs, building utilization and needs, communications (to professional staff and to public), cost analysis of selected programs. The plan will be presented to the Board of Education by April 1972 and will include an estimated time line for completion.

2. Given approval of the Board of Education, will execute the plan by assigning responsibilities for implementation, reviewing assessment design with those assigned, and holding monthly progress meetings with those (other than himself) assigned.

3. Will evaluate and summarize information to the Board of Education along with recommendations concerning the future of each item, these evaluated summaries and recommendations to be provided on the time line described above in 1.

4. Given Board response, will define appropriate resources and administrative responsibilities for the 1973 budget year.

B. For analysis and evaluation, the Board of Education will receive the plan as described in A-1 by April 1972 for evaluation and decision to proceed. They will also receive the reports described in the plan on the time line described in the plan. In addition they will receive documentation on how such findings will be reflected in the 1973 budget as well as any administrative responsibilities which may be adjusted as a result of the findings.

C. Review of this item will take place at the following times:

1. After submission of plan in April 1972.
2. At the end of the first semester.
3. At the end of the second semester.

II. Career Education

A. Concern and interest has been expressed for career education from the citizenry, the professional staff and from the U.S. Office of Education. To translate this felt need into a career education program in the Madison Public Schools, the Superintendent will:

1. See to the development and design of a career education program for the Madison Public Schools. Initial program to start in September of 1972 with expanded program to be designed by January of 1973. Such a design will include the exploration of federal and state funding as well as local resources.

2. Design procedures for informing public about programs expected to be operable or in the planning stage.

3. Arrange for inservicing of staff and/or public where applicable.

4. See to the design of evaluation instruments and the appropriate evaluation of programs in progress.

5. Provide interim progress reports to the Board of Education quarterly and concluding report no later than June of 1973.

(Continued)

Madison contract (Continued)

6. Reflect Board of Education response in budget decisions for 1973.

B. For analysis and evaluation Board of Education will receive initial design of program for 1972 by September 1. An expanded design will be provided by January 1973. Progress reports will also be provided quarterly.

C. Review sessions to be held:

1. At the end of the first semester.
2. At the end of the second semester.

Time and place of review sessions to be jointly determined by President of Board of Education and Superintendent.

III. Bond Referendum

A. It has been apparent for a while that an additional bond referendum will be necessary to complete the building program already in progress. To this end the Superintendent will:

1. Prepare a bond referendum program including rationale, costs, etc., by July 10, 1972, this program to indicate priorities within each building and among the several buildings.
2. Make necessary arrangements with city officials.
3. Develop time schedule for the referendum.
4. Provide for appropriate public information concerning the need for and particulars of the referendum.

B. For evaluation the Board of Education will:

1. Receive the bond referendum program as described in A-1 by July 10, 1972.
2. Receive monthly reports as to progress relating to A-2, A-3, and A-4 above.

C. Review of this effort will take place following the referendum at a time and place agreed to by the President of the Board of Education and the Superintendent. It may be deemed advisable to hold review sessions in conjunction with review of other components of this contract.

IV. 1973 Budget

A. An annual budget is a planning document for the year. Sound preparation of the budget is obviously critical to the operations of the school district. In facilitating a sound budget document, the Superintendent will:

1. Assign priorities, formulas, time line, and other preparation responsibilities by June 6, 1972. For 1973 these priorities will incorporate data from "Year of Assessment" described in I.
2. Determine which budget divisions can be "broken out" into program type budgets.
3. Evaluate budget requests in light of priorities established and needs cited.
4. Determine areas where cutbacks must be made (assuming that requests always exceed available resources).
5. Provide the Board of Education with the new budget format (using the 1972 budget) in July 1972.
6. Provide the Board of Education with working copy by August 15, 1972.
7. Arrange for public information program for budget analysis and support.
8. Conduct budget through to final decision by fiscal control group.

B. For evaluation purposes the Board of Education will:

1. Receive breakdown of priorities, formula, time lines, etc., by August 15, 1972.

(Continued)

Madison contract (Continued)

2. Receive monthly progress reports on budget development starting with July through final adoption by the Board.

3. Receive monthly summary of public information efforts.

4. Assess presentations to Board of Estimates and fiscal control group.

C. Review session to take place after final acceptance by fiscal control group at a time and place determined by President of the Board of Education and Superintendent. It may be advisable to incorporate review with review of other items (example: end of first semester).

V. Development of Programmed Budget for Madison Public Schools

A. Begin to develop a Planning-Programming-Budgeting-Evaluation-System (PPBES) budget format in logical sequential fashion based on a system design.

1. Program structure - identify alternatives.

2. Select one alternative with involvement of the Board of Education and the Superintendent's cabinet by January 31, 1973.

3. Develop a model which depicts the interrelationship of the planning, budgeting, accounting, and evaluating processes within the Madison Public Schools' program structure. This is to be completed by June 30, 1973.

4. Identify the information needs as determined from the model.

5. Identify the system development work necessary to meet information needs.

6. Develop a pilot PPBES program for three specific schools within one area: an elementary, middle, and high school for the 1975 budget.

7. Develop a total area PPBES budget for 1976.

8. Develop a total district PPBES budget for 1977.

9. Commit additional resources to the development of PPBES immediately.

a. Transfer one employee from curriculum to budget development.

b. Employ one additional accountant-analyst.

c. Acknowledge the possibility of additional staff in the future.

10. Conduct retraining of administrative personnel in PPBES.

**11. Very important issue - determine what the State Department of Public Instruction is planning to do in PPBES for all school districts. We must achieve compatibility with the State Department of Public Instruction with our first model. We cannot afford to develop a model and then be forced to change to conform to state procedures.

B. For evaluation the Board of Education will:

1. Receive reports as indicated in A-2 and A-3.

2. Receive progress reports relating to A-6, A-7, A-8, and A-9.

C. Review sessions will be concurrent with budget development each year.

VI. Administrative Evaluation - Salary Program

A. The Madison Public Schools initiated a salary-based Management-By-Objectives program in 1971-72. This is the first of its kind in Wisconsin and is a model increasingly under consideration by numerous other districts in Wisconsin and the mid-west. It is recognized, however, that such programs need continuous evaluation, regeneration, and sophistication in order to accomplish the anticipated results. To maintain a continuous up-date on this program the Superintendent will:

(Continued)

Madison contract (Continued)

1. See that an end-of-year questionnaire evaluation takes place for all administrators. A discussion conference of directors and selected administrators will take place to assess the first year efforts and to plan refinements and directions for 1972-73.
2. Devise with Assistant Superintendent a logical sequence of contract development for 1972-73.
3. Define responsibilities in the Personnel Department for an on-going wage and salary administration program. This is to include an on-going wage and salary committee of selected central office and school administrators.
4. Develop data for administrative salary proposal for 1973-74 for presentation to the Board of Education.

B. For evaluation, the Board of Education will:

1. Receive copies of evaluation described in A-1.
2. Receive on call any other information requested concerning either MBO or the salaries related to it.
3. Receive salary proposal for 1973-74 with supporting data.

C. Review session to be held:

1. End of first semester.
2. End of second semester.

At time and place jointly agreed to by President of Board of Education and Superintendent.

VII. Community Relations - Day to Day Working Relationships

A. There is a need for reorganization of priorities in the delegation of responsibility to area directors. The intent is to remove the daily routine from the Superintendent and to delegate issues to the respective area director and/or the Assistant Superintendent. There is also a need to continue working toward better staff relationships with teachers and other staff members and the community. The Superintendent will:

1. Design a structure for delegation of responsibilities to area directors, and report to Board of Education on August 7, 1972.
2. Design a program of publicity for the public in order to promote wide understanding of "who is responsible for which schools," to be implemented in August 1972 when school resumes in a direct manner to every parent.
3. Provide the professional staff with appropriate information concerning area director role.
4. Conduct monthly Superintendent-faculty committee meetings.
5. Meet at least once with every teaching staff in their school during the 1972-73 school year.
6. Become a more active participant in community affairs, i.e. Chamber of Commerce committee for economic development.

B. For evaluation, the Board of Education will:

1. Receive and review the structure of responsibilities, and evaluate during the year at end of first semester.
2. Receive copies of all publicity on area director's responsibilities.
3. Receive evaluations of staff meetings at end of first semester.

(Continued)

Madison contract (Continued)

C. Review sessions will be held at the end of each semester, time and place to be established by President of the Board of Education and Superintendent.

VIII. Personal Goals

A. As directed, the Superintendent will:

1. Arrange for periods of time of one week or more away from the office.
2. Continue participation in seminars and clinics for superintendents of cities the size of Madison.
3. Delegate responsibilities for night meetings (averaging four per week) to Assistant Superintendent and other directors.

B. Because of the difficulty of evaluation in this objective, the Superintendent will provide the Board of Education with any information related to the objective as may be requested by the Board of Education.

C. Review sessions to be held:

1. End of first semester.
2. End of second semester.

At a time and place jointly determined by President of the Board of Education and Superintendent.

Date _____

_____ (Signed)
Superintendent

_____ (Signed)
President, Board of Education

POMONA UNIFIED SCHOOL DISTRICT, CALIFORNIA

To: Members, Board of Education

From: Robert E. Wentz, Superintendent

Re: Evaluation of Superintendent

This is the first in what will be a series of evaluations as long as I am Superintendent in the Pomona Unified School District. The evaluation has several purposes, namely:

1. To assess the effectiveness of the Superintendent and his staff during his first six months in office.
2. To assess your expectations of the Superintendent.
3. To provide some insights to needs of the school system and its administration.

I have been employed as your Superintendent for six months and I recognize that it is difficult to give a complete assessment, but I am asking you to react as candidly as possible concerning my leadership, personal qualities, relationship with the Board, community relations, teacher-staff relations, organizational ability, and any observed strengths and weaknesses. (Please attach additional sheets or write on the back of these pages if you so desire.)

I have avoided the traditional type of check-list evaluations. If you feel some important areas are not covered, don't hesitate to share your thoughts. If you should desire to do so, I would be most happy to discuss the evaluation with you individually. Perhaps on certain of the points a group discussion might be effective. You should feel free to sign or leave it unsigned as you desire.

Evaluation

1. Do you feel the Superintendent's role in board meetings is adequate? Yes __ No __

   Do you have any suggestions for change or improvement for the Superintendent's consideration?

2. Do you approve of the way our agendas are prepared? Yes __ No __

   If you have suggestions for improving the agendas, please list your ideas.

3. Do you feel you are given enough background information for you to make decisions without devoting too much time to trivial discussion during meetings? Yes __ No __

   a. Are the materials provided helpful? Yes __ No __

   b. Is there any particular area where material is insufficient? Please specify.

   c. Do you like receiving some materials between board meetings rather than saving all materials for the board packet? Yes __ No __

4. Do you feel that the Superintendent has delegated authority effectively? Yes __ No __

   Do you have any suggestions for improvement?

(Continued)

Pomona form (Continued)

5. Do you feel that delegated authority has been used effectively by key central office administrators? Yes __ No __

   If you have spotted any areas needing improvement, please share your observations.

6. Do you feel that the Superintendent is taking prerogatives that he has not been instructed to by the Board? Yes __ No __

   If "Yes," please list examples:

7. Do you believe that there has been adequate and open communication between the Board members and the Superintendent? Yes __ No __

   If you feel improvement is needed in this area, please comment.

8. Do you believe the Superintendent is relating well to the community? Yes __ No __

   Regardless if you answer "Yes" or "No," do you have any suggestions to offer in the improvement of community relations?

9. Do you believe the Superintendent is relating well to his staff? Yes __ No __

   Do you have any comments?

10. Please list any significant accomplishments made by the school system during the past six months.

11. List in order of priority the four major problems the Board faces:

    a.

    b.

    c.

    d.

12. Do you think the Superintendent attempts to dominate the thinking of the staff? Yes __ No __

    If "Yes," in what way?

13. Do you think the Superintendent attempts to dominate the thinking of the Board? Yes __ No __

    If "Yes," in what way?

14. List any weaknesses you have observed in the operation of the school system.

NORTH SYRACUSE CENTRAL SCHOOL DISTRICT, NEW YORK

TO BOARD MEMBERS:

Performance appraisal of any individual is a serious and responsible assignment. It should not be taken lightly and could do more harm than good with relationships of the individual involved, therefore, I would earnestly like this to be a complete and honest appraisal of our Superintendent. Realizing that some of you have not participated in this process, I have written a few guidelines which are normally followed whenever an appraisal is made.

In final form, the appraisal should be a reflection of your judgment as a board member supported by as much measurable evidence and rationale as possible. It should also be a summary of the results achieved by the Superintendent in the position he held during the appraisal period. It may also include the impressions and opinions of others to add support to your judgment.

In instances where opinions, impressions, or judgments of others are used, it is well to remember that this information should be helpful to add to or reinforce your knowledge, but should not be identified as such or used as the sole appraisal information. To the contrary, the final appraisal must be yours. The Superintendent wants to know how you, as his "boss" appraise him and he will not be receptive to judgments of this kind from others.

In order to do an effective job of appraisal, it may be well for you to review the sources of information against which the Superintendent should be appraised:

1. Job description or position guide.
2. District goals, projects, plans.
3. Work now in progress.
4. Work already committed, but not underway.
5. Situational factors which may affect the Superintendent's performance–e.g. organization, managerial, budget, etc.
6. Outstanding items of past performance which you consider a display of strength and which should be continued.
7. Performance items identified which were considered below acceptable standards to indicate the changes you feel required.
8. Length of time on present assignment and previous appraisals.

Attached is an appraisal form which I prepared. It covers a majority of the Superintendent's responsibilities, however, you may want to add or delete from this listing, that is your prerogative.

I would appreciate each of you filling out the appraisal form before calling a meeting with board members only. At this meeting we will prepare a composite from your inputs and then have a subsequent meeting with the Superintendent.

CHAIRMAN, BOARD OF EDUCATION

(Form follows)

NORTH SYRACUSE CENTRAL SCHOOL DISTRICT
SUPERINTENDENT EVALUATION

ORGANIZATION PLANNING, ADMINISTRATION, AND SUPERVISION

How well does he: Comments

1. Select school district staff?

2. Establish and maintain clear-cut lines of communications?
   a. school board
   b. staff
   c. employees
   d. community

3. Administer school district policies?

4. Delegate appropriate responsibilities and authorities?

5. Practice sound principles of human relations?
   a. school board
   b. staff
   c. employees
   d. community

6. Give instructions and assignments and follow through to assure they are carried out?

7. Exercise leadership with respect to his subordinates?

WORK PLANNING AND EXECUTION

How well does he: Comments

1. Plan and schedule district programs (long and short range)?

2. Make decisions (accuracy, soundness, timing)?

(Continued)

North Syracuse form (Continued)

3. Solve problems and overcome obstacles?

4. Keep the school board and others informed of pertinent activities concerned with his work?

5. Establish and interpret objectives, policies, procedures and practices?

6. Maintain essential measurements and effective operational controls?

7. Recognize opportunities for improvement and initiate action?

8. Accept responsibility and follow through to completion?

STUDY AND RESEARCH

How well does he: Comments

1. Recognize and identify needs for study and research?

2. Keep up to date in his required field of study?

3. Provide information that is sound and reliable?

4. Maintain an objective viewpoint, open-mindedness, and broad perspective?

(Continued)

North Syracuse form (Continued)

RELATIONSHIPS

How well does he: Comments

1. Establish and maintain contacts internally and externally?

2. Represent and further the school district interests in his outside contacts?

3. Persuade others, sell ideas, and influence points of view?

4. Represent the school district, newspapers, T. V., public meetings, etc?

5. Represent the school district during contract negotiations?

BUDGET – COST CONTROL

How well does he:

1. Get staff involvement in budget preparation?

2. Exercise leadership in cost control (influence)?

3. Identify areas of opportunities for cost improvements?

4. Implement cost measurement reports?

What are his significant accomplishments?

What areas have you identified requiring need for improvement?

CRITERIA FOR EVALUATION OF SUPERINTENDENT
Roseville, Michigan

It is suggested that each statement be rated on a five point Likert scale, as follows: strongly disagree, disagree, no opinion, agree, strongly agree.

I. Board leadership

A. Policies: The superintendent makes recommendations to the board about policy. The recommendations are timely, they are sound, and they are in the best interest of educating children.

B. Board relations: The superintendent works to establish a friendly, congenial working relationship with the board.

C. Flow of information
1. The superintendent works to keep the board well-informed of what is going on inside the schools.
2. The communication lines are always open.

D. Response to board directions
1. The superintendent informs other school personnel of the board's decisions.
2. The superintendent follows through on the board's directives to him.
3. He acts promptly on the board's directives.
4. He interprets board directives accurately.

II. Administrative leadership

A. Curriculum
1. He reports curricular directions to the board of education.
2. He provides written curriculum and instructional directions to school personnel.
3. He supplies the board with information concerning student progress to be used by the board when they are making decisions.
4. He aids the administrative staff in the collection, presentation, and interpretation of student progress data.

B. Budgetary
1. He assists in the development of a budget which reflects the instructional needs of students.
2. He assists in presenting a budget to the board which is in line with the instructional needs of students.
3. He provides the board with information on the budget when information is requested.
4. He aids the administrative staff in the collection of data, budgetary development, and interpretation of budget.
5. He informs the board about alternative ways in which to use the financial resources of the district for the best interests of the students.

C. Personnel
1. He provides the school personnel with a yearly orientation of school board policies and operational procedures.
2. He meets with teacher and administrative groups on a regular basis to provide information and feedback opportunities.
3. He aids the negotiation process.
4. He abides by the negotiated contract.
5. He provides the board with information on staff personnel.

D. Community relations
1. He meets with community groups regularly.
2. He provides information to community groups.
3. He responds to questions asked by each of the community groups.
4. He provides the board with information and feedback from community groups.

REVIEW AND EVALUATION OF THE SUPERINTENDENT*
Lansing, Michigan

Instructions:

1. Read carefully the rating descriptions.
2. Mark an "X" in the box below the designated level most descriptive of actual performance. If you are unable to react to any specific item, leave the box blank.
3. Add any general comments and/or suggestions at the bottom or back of each page.

Rating descriptions:

1. VERY INADEQUATE: Incompetent.
2. NEEDS STRENGTHENING: Limited performance, knowledge and/or experience--specific need for professional growth experiences.
3. SATISFACTORY PERFORMANCE: Good knowledge and/or experience--could benefit from professional growth experiences.
4. BETTER THAN AVERAGE PERFORMANCE: Comprehensive knowledge and experience--capable of supervision, research, planning--could contribute to professional growth programs.
5. SUPERIOR PERFORMANCE: Outstanding.

I. GENERAL ADMINISTRATION	1	2	3	4	5
1. Is skillful in working with budget and finance procedures.					
2. Understands and utilizes modern office procedures.					
3. Is competent in fulfilling duties of plant management.					
4. Ability to communicate effectively -- orally and in writing.					
5. Seeks to maintain close working relationships with staff.					
6. Knows and utilizes correct personnel procedures.					
7. Knows and fulfills statutory, legal, and policy responsibilities.					
8. Understands and utilizes modern long range planning techniques.					
9. Properly utilizes Department Heads in planning operations.					
10. Is skillful in acquiring needed fiscal and support resources.					
11. Constantly modernizes his administrative skills.					
Composite Evaluation - "General Administration"					

Comments and/or suggestions:

(Continued)

* The superintendent requests that board members and administrators evaluate him on this form.

Lansing form (Continued)

II. INSTRUCTIONAL LEADERSHIP	1	2	3	4	5
1. Effectively implements staff recommendations for instructional improvements.					
2. Understands teaching and learning process.					
3. Keeps up with curriculum trends and research findings.					
4. Provides atmosphere which encourages creativity.					
5. Supports and assists continuous program evaluation.					
6. Intervenes to reduce opportunities for staff failure.					
7. Supports and develops programs for staff growth and improvement.					
8. Understands and supports programs for individually prescribed instruction.					
9. Understands and promotes use of modern instructional technology.					
10. Represents the School System in statewide instructional decisions.					
Composite Evaluation - "Instructional Leadership"					

Comments and/or suggestions:

III. PERSONAL LEADERSHIP	1	2	3	4	5
1. Consideration for others.					
2. Open mindedness.					
3. Demonstrated integrity.					
4. Available to faculty.					
5. Effective in decision making.					
6. Effective in delegating authority.					
7. Effective in assigning responsibility.					
8. Committed to improving the School System.					
9. Skilled in human relation skills.					
10. Strong physical health.					
11. Strong mental-emotional health.					
Composite Evaluation - "Personal Leadership"					

Comments and/or suggestions:

(Continued)

Lansing form (Continued)

IV. PROFESSIONAL LEADERSHIP	1	2	3	4	5
1. Demonstrates consistent philosophy					
2. Sets and maintains priorities.					
3. Utilizes 'team' management concept.					
4. Recognizes initiative, productivity, and creativity.					
5. Accepts responsibility.					
6. Delegates authority.					
7. Identifies instructional goals in terms of student needs.					
8. Sensitive to staff needs in relationship to instructional goals.					
9. Is committed to program evaluation and improvement.					
10. Identifies and involves local schools' leadership in educational decisions.					
11. Participates in professional activities, organizations, committees.					
12. Participates in professional growth activities.					
13. Has adequate professional preparation.					
Composite Evaluation - "Professional Leadership"					

Comments and/or suggestions:

SUMMARY

A. Do you have any other general or specific comments and/or suggestions as to how I could more effectively serve the school system?

B. What do you think are the major problems-issues-concerns facing our school system?

C. In your opinion, our school system could best be served by (check one):

1. Retaining the existing superintendent _____
2. Selecting a new superintendent _____
3. I am undecided _____

If convenient, could you give me some general information about you:

New staff member (0-3 years) _____
Recent staff member (4-10 years) _____
Senior staff member (11 years or more) _____

EVALUATION OF THE SUPERINTENDENT BY THE BOARD OF EDUCATION
Wayne-Westland Community Schools, Michigan

This document is to be used to prepare a composite estimate by the Board of Education of the performance of the Superintendent. It is intended that it will indicate the opinion of the Board regarding the Superintendent's performance in his many areas of responsibility. It is recognized that there are some aspects of the Superintendent's job that cannot be accurately evaluated by the Board of Education. A poor evaluation result in some area, therefore, may indicate a number of things other than poor performance.

Probably the major benefit that can be realized from this evaluation is the input it will provide the Superintendent regarding the Board's view of his activities and performance. To get the most information of this type it was necessary to expand the questions to cover more than just the Superintendent and his responsibilities. There are some questions about his assistants, the staff in general, and the district.

Plan. The Superintendent of a modern public school system is the top administrator of the system and as such is responsible for almost all aspects of system operations. The responsibilities require that the Superintendent have a good understanding and considerable expertise in a wide range of activities. The following are subjects considered in the questionnaire to provide evaluation results in these activities: dedication and industriousness; directing educational activities; personnel matters; business administration; public relations; negotiations; participation in professional organizations; and relations with the Board of Education.

In the following a number of questions are asked about each of these eight major subjects. Nothing is intended or implied regarding the relative importance of subjects by the order of the list.

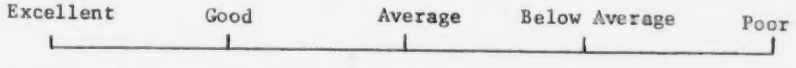
Instructions. Each part of the evaluation has a section title and a brief elaborating statement which is intended to clarify just what aspect of total responsibility is being considered. The evaluation is performed by answering the questions in each section. It will be noticed that each question is followed by a line with five calibration marks. The Board member is requested to put an "X" on the line in the position that in his opinion will indicate the Superintendent's performance. If no answer is selected, it will be assumed that the Board Member does not understand or does not wish to answer the question.

Summary and presentation of results. The results of the evaluation questionnaires will be collected and summarized by the President of the Board of Education. The average answer for each question will be indicated on a duplicate copy of the questionnaire. The Superintendent and each Board member will be given a copy of the results. The Superintendent will not be given the questionnaires from individual Board members or be informed as to how any individual answered the questions, however. If the Superintendent wishes, the results can be discussed in a study session with the Board.

Dedication and Industriousness

. . . . . the concern the Superintendent has about doing a good job and how hard he is working.

1. How concerned do you feel the Superintendent is about meeting the obligations of his position? How do you rate his dedication?



NOTE: Each of the following statements is followed by a scale.

(Continued)

Wayne-Westland form (Continued)

2. How hard is the Superintendent working? How industrious is the Superintendent when compared with other Superintendents?

3. How industrious is the Superintendent when compared with others with a similar salary in industry, business, and other professions?

4. How can the Superintendent make more efficient use of his time? Rate his success in using each of the following means of reducing his work load--

   a. Effective use of subordinates and assistants.

   b. Establishing priorities so that the number of items requiring his attention are reasonable.

   c. Organizing procedures so that the amount of time for each item is reasonable.

   d. Rationing of the time devoted to "side issues" and distractions.

5. If you have any comments or suggestions you would like to make regarding the Superintendent's dedication or industriousness, make them here.

Directing Educational Activities

. . . . . activities concerned with educating the children of the district.

1. How strong is the Superintendent's interest in the actual education activities of the district?

2. How do you rate his performance (regardless of interest)? How do you judge his leadership in education activities?

3. How do you rate the performance of the district with respect to education of the grades K through 6?

4. How do you rate the performance of the district with respect to education of grades 7, 8, and 9?

5. How do you rate the performance of the district with respect to education of grades 10, 11, and 12?

6. How well do the educational opportunities of the district meet the individual needs of our children?

   a. How good is our special education program?

   b. How good is our vocational education program?

   c. How good is our program in dealing with gifted children?

   d. How good is the educational opportunity for students planning to attend (and graduate from) a four-year college?

7. How do you rate the performance of the Superintendent's assistant who is responsible for curriculum?

8. How do you rate the performance of the coordinators?

9. How good a job is being done in the district exploring and evaluating new curriculum and program innovations?

10. How do you rate the teacher inservice activities of the district?

11. If you have any suggestions or comments to make about the Superintendent's responsibilities regarding educational activities in the district, please make them here.

(Continued)

Wayne-Westland form (Continued)

Personnel Matters

. . . . . obtaining and using the best personnel to maintain and operate the Wayne Community School District including teachers, administrators, and noncertificated staff members.

1. How expert is the Superintendent at selecting staff?

2. How do you rate his success at selecting his central office assistants?

3. How expert is the Superintendent at getting the maximum help from his assistants?

4. How do you rate the performance of the Superintendent's assistant for personnel matters when compared with others performing a similar function in other school districts?

5. How do you rate the performance of this assistant if it is appropriate to make allowances for age, experience, salary, etc.?

6. How do you rate our present administrative staff including principals and assistants?

7. How do you rate our present teaching staff?

8. How do you rate the noncertificated staff?

9. How strong an effort is being made to obtain the best possible persons for each staff position in the district?

10. How do you rate the district with respect to the following factors which may be affecting our success in getting the best possible persons to fill staff positions?

    a. Money (Do we pay well?)

    b. Promotions (Do we show promise of an opportunity for promotion?)

    c. Experience (Is there a good opportunity to work with established experts on a program or in a manner that will provide valuable experience?)

    d. Recognition (Are exceptional achievements and exceptional staff members given appropriate recognition and appreciation?)

11. If you have any suggestions or comments to make regarding personnel matters that would be of help or value to the Superintendent, please make them here.

Business Administration

. . . . . operation of the business we know as the WCSD, including accounting procedures, purchasing, inventory control, maintenance, investments, new construction, construction contracts, etc.

1. Do you feel the Superintendent has a strong interest and/or ability in the business administration aspect of system operations?

2. How do you rate his business administration performance (regardless of interest)?

3. How do you rate the performance of the Superintendent's assistant(s) for business matters when compared with other men holding similar positions in other school districts?

4. How do you rate the assistant(s) compared with other men holding similar positions, if it is appropriate to make allowances for age, experience, salary, etc.?

5. How do you rate the over-all business operations of the WCSD regardless of reasons, when compared to other school districts?

(Continued)

Wayne-Westland form (Continued)

6. When compared with business and industry?

7. What is your impression of the business operations of the district's elementary schools?

8. What is your impression of the business operations of the district's secondary schools?

9. A key responsibility of the Board of Education is the approval of the budget. How well does the administration perform related tasks?

   a. How well does the administration prepare the budget?

   b. How well does the administration present and explain the budget to the Board of Education?

   c. How well does the administration keep the Board informed of the budget matters as they change during the year?

10. If you have suggestions or comments to make about the Superintendent's responsibilities or performance regarding business matters, please make them here.

Public Relations

. . . . . activities concerned with promotion of the public interest and support of the Wayne Community School District.

1. Do you feel the Superintendent has a strong interest and/or ability in this aspect of district operations?

2. How do you rate his performance regarding public relations?

3. How do you rate the performance of the Superintendent's assistant who handles most of the district's public relations, when compared with other men performing similar functions in other school districts?

4. How do you rate the performance of the assistant when compared with men holding similar positions if it is appropriate to make allowances for age, experience, salary, etc.?

5. How do you rate the over-all public relations success of the WCSD?

6. How do you rate the over-all performance of the entire WCSD staff (all paid employees) with regard to public relations?

7. How do you judge the performance of the district in winning the support of the press?

8. How do you rate the WCSD administration with regard to keeping the public fully and accurately informed?

9. How do you judge the Superintendent's ability to estimate the public reaction to sensitive issues?

10. Do you have any suggestions or comments you would like to make regarding public relations of the WCSD? If "Yes," please make them here.

Negotiations

. . . . . activities concerned with reaching a contractual agreement with organized groups in the district and related activities such as handling grievances, etc.

1. Do you feel the Superintendent has strong interest and/or ability in this area of district operations?

(Continued)

Wayne-Westland form (Continued)

2. How do you judge his performance (regardless of interest and ability)?

3. How do you rate the performance of the Superintendent's assistant who is most responsible for negotiations and related matters, when comparing him with others in a similar position?

4. How do you rate him if you make allowances for his age, experience, other responsibilities, etc.?

5. From the viewpoint of the public, the tax-payers of the district, how good is our current contract with the teachers?

6. From the viewpoint of the public and tax-payers of the district, how good is our current contract with the secretaries?

7. From the viewpoint of the public and tax-payers of the district, how good is our present contract with the custodians, etc.?

8. How do you feel the district is doing with regards to employee grievances, disputes, etc.?

9. How well is the administration prepared for the next round of negotiations?

10. How good, in your opinion, is our present legal counsel?

11. If you have any suggestions or comments to make regarding the Superintendent's responsibilities regarding negotiations and employee relations, please make them here.

Relations with Board of Education

. . . . . how smoothly and effectively the Superintendent works with the Board of Education.

1. How do you rate the Superintendent's efforts to understand and work with the Board of Education?

2. How successful is he? How do you rate relations between the Board and Superintendent?

3. How do you judge the Superintendent's understanding and appreciation of the "role" of an elected local board of education?

4. How do you rate the Superintendent's success at keeping the Board informed?

5. How do you rate the Superintendent's success at giving advice and background information to the Board?

6. How good is the "job" the Superintendent does of explaining the actions and attitudes of the Board to the employees?

7. Clearly it's a difficult job to respond to individual concerns of Board members, to understand the needs of the staff and district, and yet somehow not manipulate or bring improper pressure on the individual Board members. How do you rate the Superintendent's success at this very difficult aspect of his job?

8. If you have any comments or suggestions you would like to make regarding the Superintendent's relations with the Board of Education, please make them here.

(Continued)

Wayne-Westland form (Continued)

Participation in Professional Organizations

. . . . . participation of the Superintendent in activities related to his profession and position, but not exclusively concerned with the operation or problems of the WCSD. Activities with MASA, other professional organizations and some of his "reactions" with the legislature and Department of Education are in this category.

1. How important do you feel such activities by the Superintendent are to the WCSD?

   Very Important | Important | Sometimes Important | Seldom Important | Not Important

2. How do you judge the Superintendent's current level of participation in such activities?

   Very Active | Active | Average Participation | Not Very Active | Inactive

3. How important do you feel such activities are to all the children and tax-payers of Michigan?

   Very Important | Important | Sometimes Important | Seldom Important | Not Important

4. How important are similar activities by the other administrative staff members to the WCSD?

   Very Important | Important | Sometimes Important | Seldom Important | Not Important

5. What is your impression of the level of participation of other administrative staff members in such activities?

   Very Active | Active | Average Participation | Not Very Active | Inactive

6. How important are such activities by other staff members (teachers) to the WCSD?

   Very Important | Important | Sometimes Important | Seldom Important | Not Important

7. What is your impression of the Superintendent's attitude about the participation of his staff members in such activities?

   - It's part of their responsibility to participate
   - They should try to participate whenever convenient
   - They should participate if so inclined
   - No big objection to staff participation
   - They must be careful it doesn't interfere with work

8. If you have any suggestions or comments to make regarding the Superintendent's participation in professional organizations, etc., please make them here.

This study was designed and written by Suzanne K. Stemnock, Professional Assistant, Educational Research Service

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